COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

UNITED STATES DEPARTMENT OF THE TREASURY

CDFI Fund ▪ 601 Thirteenth Street, NW ▪ Suite 200, South ▪ Washington, DC 20005 ▪ (202) 622-8662

FY 2006 CDFI Program
Combined Application for Financial Assistance and/or Technical Assistance

## Using Grants.gov to Submit Your CDFI Program Application

Using Grants.gov to Submit Your CDFI Program Application

In order to comply with new federal requirements, all Applicants for the CDFI Program must now submit their applications via the www.Grants.gov interface, the official website for Federal grant information and applications.

A complete Application Package consists of the official standard government form: Application for Federal Assistance (SF-424) and all required Applications Materials. Because of the way Grants.gov is set up, the Application Materials (i.e., the different application templates such as the Emerging CDFI Eligibility Questionnaire, the CBP questions, and the Application Charts) are accessed through a link called the "Application Instructions" and then actually saved as "Attachments" and, along with the SF-424, are "uploaded" via Grants.gov. The following instructions walk you through the basic steps for registering on Grants.gov, accessing the Application Package, and submitting a complete Application Package via Grants.gov.

We recognize that this a new process for you – and one that can be confusing. We strongly encourage you to call the Program staff if you have any questions about the process or are confused along the way. The Program staff can be reached during normal business hours at 202-622-6355.
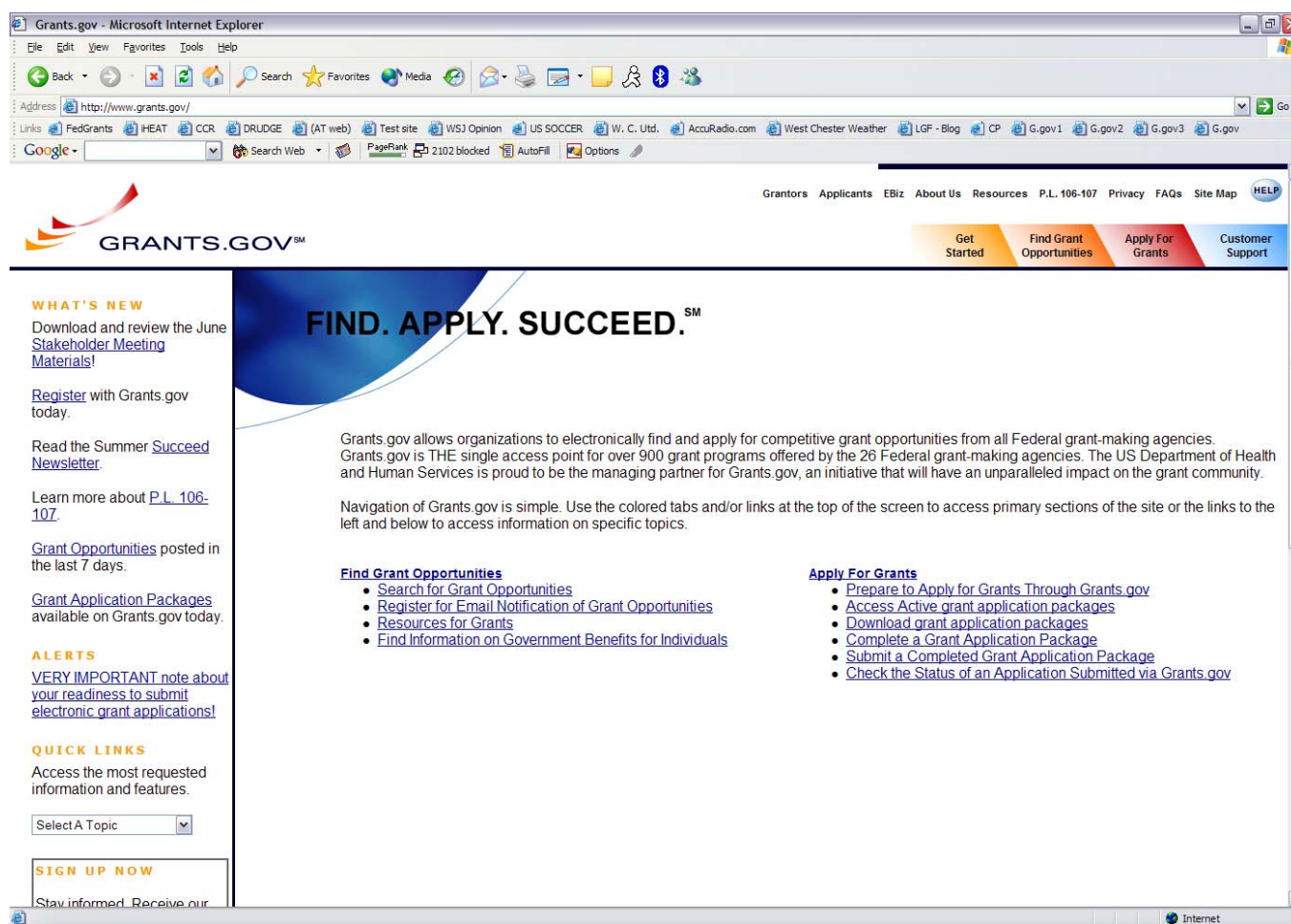
Step #1: Install the PureEdge Viewer.

In order to register on Grants.gov or access, complete, and submit applications, you must download and install the PureEdge Viewer, a small, free program.

Actions:

❑ From the Grants.gov home page: scroll down under **TIPS AND TOOLS** on the right side of the screen, and click **Download PureEdge Viewer**.

❑ Choose to **Save** the file when the download process begins. This will open the **Save As** window where you can designate where the program should save on your computer. Browse to where you would like the program to save on your computer. Once you have browsed to where you want the PureEdge Viewer to save on your computer, click **Save**. This will download the program. Follow the screen prompts to complete the download process.

– Make sure that the box next to **Close this dialog box when download completes** is NOT checked on the Download Complete window. If the Download Window closes when the download completes, you will need to locate the downloaded file on your computer and open it.

Step #2: Register Applicant Organization with Grants.gov

You cannot submit the Application Package without first registering on Grants.gov. Registering on Grants.gov entails four primary actions:

• Obtain a Dunn & Bradstreet Universal Number (DUNs).

• Register your organization with the Central Contractor Registry (CCR).

– The CCR is the primary vendor database for the U.S. Federal Government. The CCR collects, validates, stores, and disseminates data in support of agency acquisition missions. Grants.gov uses the CCR to help centralize information about grant recipients and provide a central location for grant recipients to change organizational information. CCR registration is also an element of the electronic signature process. A handbook describing CCR and the registration process can be found at the following link: www.ccr.gov/handbook.asp.

– Online registration with CCR will take about 30 minutes to complete. Your registration should become active with CCR within 3-5 business days – so you should do this as soon as possible. **Do not wait until January 23rd to register on the CCR!**

• Register with Grants.gov's Credential Provider: Operational Research Consultants (ORC). The CCR registration must be active before you can register with ORC. Once you are registered with ORC, you will receive an ID and password to use when submitting your Application Package via Grants.gov.

• Authorize the appropriate representatives of your organization (called Authorized Organization Representatives (AOR)) to submit grant applications.

– Anyone can find, download, and complete applications. Only AORs can submit applications.

Actions:

❑ At www.grants.gov/assets/GrantsgovCoBrandBrochure8X11.pdf, download the 6-page version of the instructions for "Getting Started" on Grants.gov. You can also go directly to the Get Started screen from the Grants.Gov home page (the first link at the top right of the homepage).

– These instructions walk you through the entire registration process – including registering with the CCR and ORC.

❑ Read and follow the instructions to register on Grants.gov.

Step #3: Access and Save Application Materials

To start completing the 2006 CDFI Program Application, you must access the Application Package and save them to your computer.

Actions:

❑ Go to www.grants.gov and click on the third tab along the top right of your screen called **Apply for Grants** – this link brings you to the **Apply for Grants** screen (pictured below), which has the most helpful menu of options along the left side of the screen for accessing the Application Materials.
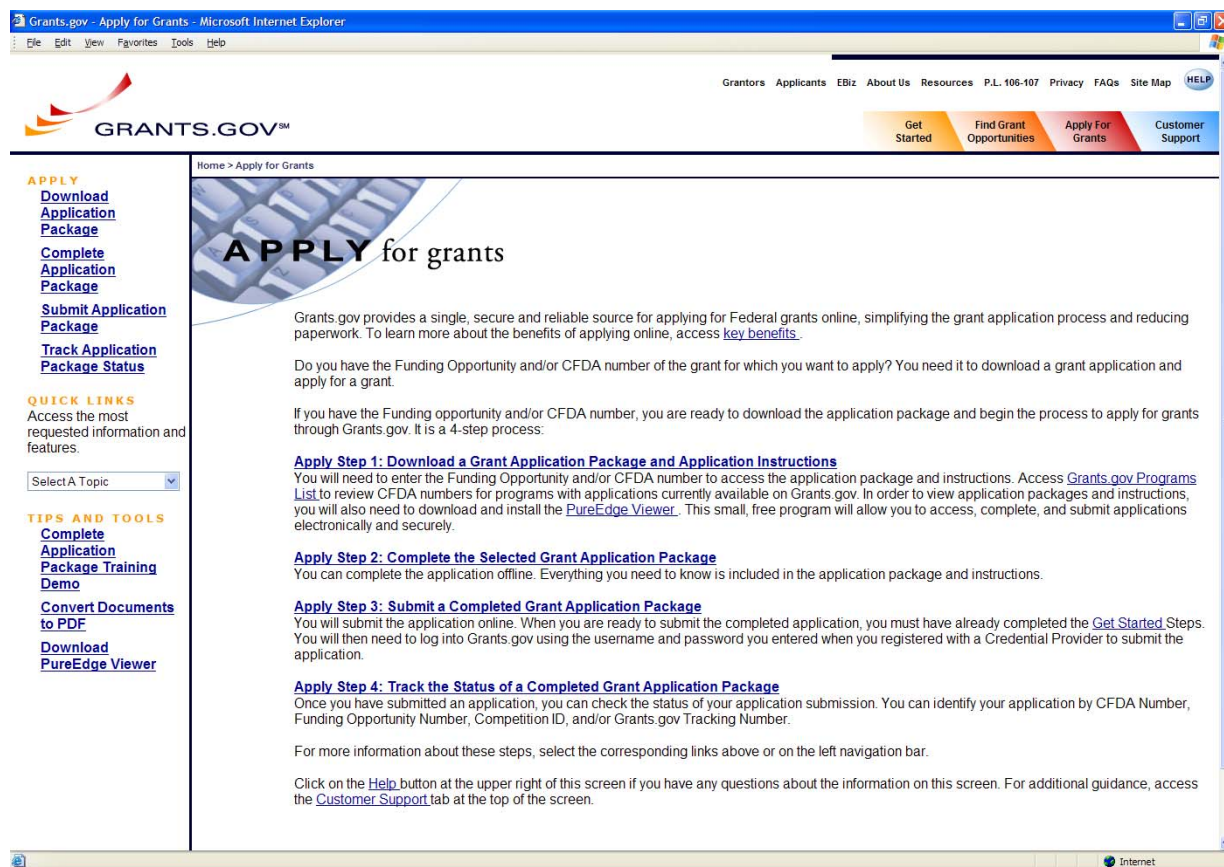
❑ Under **APPLY** on the left side of the screen, click on **Download Application Package**.

❑ You will have the option of entering the CFDA Number or the Funding Opportunity Number to call up the CDFI Program 2006 Application Package. You must complete at least one of these fields to download an application. Enter either number in the box provided.
   – CFDA Number: **21.020.**
   – Funding Opportunity Number: **CDFI-FATA-06.**

❑ Click **Download Package** to download the Application Package. This will take you to the **Selected Grant Applications for Download** screen.

CFDA	Opportunity Number	Competition ID	Competition Title	Agency	Instructions & Application
21.020	CDFI-FATA-06	CDFI-FATA-06	CDFI-FATA-06	DOT CDFI	download

❑ To download an Application Package (which includes the SF-424) and the Application Instructions (which includes the templates for all the Application Materials), click **Download** under **Instructions and Application** (see above) to get the **Download Opportunity Instructions and Application** screen (pictured below).

   – Instructions for **Download Application Package** (see below) are found under Step 4.

Download Opportunity Instructions and Application

You have chosen to download the instructions and application for the following opportunity:

CFDA Number: 21.020: Community Development Financial Institutions Program
Opportunity Number: CDFIFA05: CDFI FA 05 Grant
Competition ID: CDFIFA05
Competition Title: CDFI FA 05 Grants
Agency: DOT CDFI
Opening Date: 12/07/2005
Closing Date: 01/31/2006

If you would like to be notified of any changes to this opportunity please enter your e-mail address
be e-mailed in the event this opportunity is changed and republished on Grants.gov before its clo

[   ] [Submit]

Download the instructions and application by selecting the download links below. While the instru
files may open directly, you may save the files to your computer for future reference and use. Yo
access to read the instructions or the application once you save them to your computer.

1. Download Application Instructions

2. Download Application Package

❑ Click **Download Application Instructions** to download the Application Materials.

❑ Choose **Save** during the download process and then **Open Folder** when done. Double-click on the saved Zip file and a list of documents opens up like below:

File   Actions   Options   Help

New   Open   Favorites   Add   Extract   View   CheckOut   Wizard

Name	Type	Modified
CombinedApplication2006 FINAL.pdf	Adobe Acrobat Document	12/5/2005 9:23 AM
Emerging CDFI Eligibility Questionnaire Template.doc	Microsoft Word Document	12/2/2005 1:08 PM
Charts Workbook - Final 12-2-05.xls	Microsoft Excel Worksheet	12/2/2005 11:20 …
Application CBP Template.doc	Microsoft Word Document	12/1/2005 8:21 PM
CDFI Program Regs 2005.pdf	Adobe Acrobat Document	12/1/2005 7:49 PM
501 (c) (4) Template.dot	Microsoft Word Template	12/1/2005 6:29 PM
Environmental Review Form Template.dot	Microsoft Word Template	12/1/2005 6:18 PM
CDFI Program NOFA 06-07.pdf	Adobe Acrobat Document	12/1/2005 6:08 PM

❑ Under **Actions**, choose **Select All** then **Extract** to copy all files to your computer.

❑ You can now work on preparing your documents to be uploaded into Grants.gov. This includes drafting your responses to the CBP and completing the Applicant Charts workbook. See Attachment B at the end of this document for a detailed list of files to upload. **This does not include the SF-424 – see below for instructions on accessing, completing, and submitting the SF-424.**

Step #4: Create and Save the PureEdge "Grant Application Package" File

Actions:

❑ From the **Apply for Grants** page of Grants.gov, click on **Download Application Package** to return to the **Download Opportunity Instructions and Application** page:

❑ Click option 2, **Download Application Package**. This opens a file (see picture below) in the PureEdge software where you will complete the SF-424 and upload the Application Materials that you completed offline (e.g., the CBP template, the Application Charts, etc.).

– **Note that this is where you'll make your final submission. Do not click the SUBMIT button until all steps are completed.**

❑ Save this PureEdge file to your computer by Clicking on **Save** at the top of the screen. Note: A warning message appears informing you that one or more of the items in this form contains an invalid value and asks if you want to proceed anyway. Click Yes.

– You are creating a PureEdge file that you will be able to return to later. Therefore, you need to save this file to readily available directory on your computer. The Fund recommends saving this file to your desktop so that it will be easy to find.

– The Application Package can be completed in its entirety offline; however, you will need to login to the Grants.gov website during the submission process. You can save your application at any time by clicking the "Save" button at the top of your screen. The "Submit" button will not be functional until the application is complete and saved.

❑ Enter a name for the application in the **Application Filing Name** field.

Do not click the submit button on the PureEdge Grant Application Package form until you are ready to submit the complete Application Package.

Step #5: Completing the SF 424

Actions:

❑ To open the saved **Grant Application Package** file, go to your Desktop (or wherever you saved it), and double click on the PureEdge icon.

❑ In the box on the left side of the screen labeled **Mandatory Documents** select **Application for Federal Assistance (SF-424),** then click on **Open Form** below the box to open the SF-424.

❑ You can enter data on the SF-424 (see next page for visual) at a various times. Click **Close Form** to save.

– See notations in Attached 1 about how to complete the individual SF-424 fields.

❑ Once you have filled in all of the fields on all three pages, print the completed SF-424 and send the hard copy as the cover sheet with paper attachments. **Verify that all data is correct!**

Step #6: Uploading Application Attachments for Final Submission

Actions

❑ After you close out of the SF-424, you return to the **Grant Application Package** screen.

❑ From the box on the left labeled **Mandatory Documents:** select **Attachments** then click on **Open Form**. A table will open allowing you to upload each of the documents you've completed:

❑ Use one row per document to upload all required templates for a complete Application. See Attachment 2 for additional details on which forms are required. Click **Close Form** at top of screen when all documents have been added. When you close this form, you return to the Grants Application Package screen.

Step #7: Submitting the Final Application Package

❏ From the Grants Application Package screen, select **Application for Federal Assistance (SF-424)** from **Mandatory Documents**. Click on the arrow button between the two boxes to move the SF-424 to the box on the right box labeled **Mandatory Documents Completed for Submission**.

❏ Follow same procedure to move the **Attachments** to the **Mandatory Documents Completed for Submission** box.

❏ Click **Check Package for Errors** from the top menu. Make changes as necessary based on each error found in the package.

❏ When you are sure you have corrected all errors and have placed all required documents into the **Mandatory Documents Completed for Submission** box – then you are ready to submit your Application Package. By clicking **Submit**, you are sending the SF-424 plus the Attachments to the Fund as your final submission.

  – Make sure that all the required files (i.e., the CBP template, the Application Charts) are included within the Attachments list. Verify by selecting **Attachments**, then clicking on **Open Form**.

APPLICANTS WILL NOT HAVE AN OPPORTUNITY TO PROVIDE MISSING ATTACHMENTS.

Attachment #1: Clarification on Fields in the SF-424

Required fields are prefaced with an asterisk (*). You may not be familiar with all the fields so we've provided the following annotations:

#4. Applicant Identifier: Automatically filled by the system upon submission – no entry necessary. Note that you will need to print out the draft SF-424 as the cover page. Printout will be matched up based on DUNS #.

#5a. Federal Entity Identifier: Leave blank

#5b. Federal Award Identifier: Enter 21.020

#6.   State use only – Leave blank.

#7. State use only – Leave blank.

#8. Applicant Information: Enter all yellow fields making sure to enter correct DUNS. The electronic signature will not work unless the DUNS # matches the CCR registration information.

Section e. Organizational Unit – leave both boxes blank

Section f. Name and contact information...: Enter the Contact Person's (not the Authorized Representative's) data in these boxes. If there is no contact person enter Authorized Rep's info.

Organizational Affiliation: leave blank

#9.   Type of Application: Select most appropriate description from list of dropdown options.

#10. Name of Federal Agency – Prefilled – no entry necessary

#11. Catalog of Federal Domestic Assistance Number: Prefilled – no entry necessary

#12. Funding Opportunity # = Prefilled with CDFI-FATA-06; for Title: enter "CDFI Program 2006"

#13. Competition Identification # -- leave blank – no entry necessary

#14. Areas affected: Leave blank

#15. Descriptive Title of Applicant's Project: Enter Applicant's Organization Name

#16. Congressional Districts: Enter SS## format SS = state code and ## = #. Use same for both boxes. See www.house.gov to find your congressional district.

#17. Proposed Project: Start Date: Enter 09/01/2006; End Date: Enter 08/31/2009.

#18. Estimated Funding $: Enter total award request for Federal and Total, enter all zeroes in the other boxes.

#19. Is Application Subject to Review by State...: Select option C.

#20. Is the Applicant Delinquent...: Answer and provide Explanation if Yes selected.

#21. This is the application certification – you must click the "I agree" button.

Attachment #2 Application Components and Submission Procedures

Application Component	Prepare In…	Submit via…	TA Only Applicants vs. FA Applicants
Standard Form (SF) 424	Grants.gov Online Form	Grants.gov and Mail to BPD	**Both TA Only Applicants and FA Applicants:** ❑ Complete form online and send hard copy to BPD as cover page to paper attachments.
Documentation of EIN	Paper	Mail to BPD	**Both TA Only Applicants and FA Applicants:** ❑ Documentation from the IRS that they have their own unique EIN.
Environmental Review Form **501 (c)(4) Certification** **Assurances and Certifications**	MS Word Templates	Grants.gov upload under Attachments	**Both TA Only Applicants and FA Applicants:** ❑ Environmental Review Form and the 501(c)(4) Certification (if applicable): – Complete MS Word Templates. ❑ Assurances and Certifications: Electronic Signature on the SF 424 certifies this form – it is not necessary to submit a separate copy.
Emerging CDFI Certification Eligibility Application	MS Word	Grants.gov upload under Attachments	**FA Applicants:** ❑ Not Applicable - FA Applicants must be already certified or submit a certification application by January 13, 2006. **TA Only Applicants:** ❑ If not certified as a CDFI: Complete in MS Word.
Comprehensive Business Plan (Narrative)	MS Word	Grants.gov upload under Attachments	**Both TA Only Applicants and FA Applicants:** ❑ Complete MS Word template.
Application Charts	MS Excel	Grants.gov upload under Attachments	**Both TA Only Applicants and FA Applicants:** ❑ Complete all charts in the Excel Workbook template.
Matching Funds Documentation	Paper	Mail to BPD	**TA Only Applicants:** ❑ Not Applicable – TA awards do not require Matching Funds. **FA Applicants:** ❑ Mail original and four copies of Matching Funds documentation to BPD address above.
Financial Statements	Paper	Mail to BPD	**Both TA Only Applicants and FA Applicants:** ❑ Mail originals and four copies to BPD address above.
Organizational Chart & Resumes	Paper	Mail to BPD	**Both TA Only Applicants and FA Applicants:** ❑ Mail originals and four copies to BPD address above.

Attachment #3: Application Deadlines

Deadlines are as follows:

- **SF-424 and Attachments via Grants.gov:** submitted by **5:00 p.m. ET, Monday, January 23, 2006**.

  - The submission and upload features for the CDFI Program application in Grants.gov will be disabled after 5:00 p.m. ET, January 23, 2006.

- **Paper Attachments:** The paper SF-424, Matching Funds Documents, Financial Statements, Organization Chart, resumes, and documentation of EIN must be received by BPD at the address below by **5:00 p.m. ET, Thursday, January 26, 2006**.

  > CDFI Fund Grants Manager
  > CDFI Program
  > Bureau of Public Debt (BPD)
  > 200 Third Street
  > Parkersburg, WV 26101-5312
  > (304) 480-6088

Applicants are strongly advised to allow at least 3 business days (i.e., not Saturday or Sunday) for overnight delivery to BPD's offices in West Virginia. Allow even longer if using first class postal mail delivery.